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ABSTRACT

The college planning processes at Piedmont Virginia Community College (PVCC) are described as they were initiated and have developed over the past two years. After acknowledging the biases of this case study, the paper explains how formal planning at the college grew from a need to coordinate staff projections for program and facility needs into a cohesive picture of the college's future. Next, the formalization of PVCC's short-range planning process is reviewed. This process, which is based on prescribed cycles of college activities, is considered in terms of its first use in appointing advisory committee members, its later uses in other college activities, and its benefits. Particular focus is given to the use of this planning subcycle process in maintaining the college's working calendar. Next, PVCC's long-range planning process is covered. After noting that the process works within the existing top-down governance structure, the paper explains the two approaches which are used, i.e., the planner takes a ten-year perspective to determine what is required for the college to become what it should become based on its mission and purposes and takes a one-year perspective to maximize the use of resources toward these goals and objectives. An example is given of how these two approaches may yield different results. Next, PVCC's master plan is discussed. Finally, PVCC's efforts in establishing a mid-range planning process are briefly reviewed. (AYC)

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MASTER PLANNING FOR SHORT-, MID- AND LONG-RANGE GOALS

A Case Study Of

Piedmont Virginia Community College (PVCC)

Charlottesville, Virginia

for Presentation to the

Society of College and University Planners (SCUP)

in their Annual Conference

at

Omaha, Nebraska

on

July 14, 1981

by

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JC 810 496

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I wish first to express my appreciation for the opportunity to come to this meeting and share the planning experiences of my college with you. I consider it a distinct honor that the Piedmont Virginia Community College planning process was selected as the subject of a case study for presentation here today. The planning process and the product of that process--plans--belong to the college. It is not my planning process, or the President's for that matter although we have invested ourselves into it. If it were not the college's process it probably would not be worth discussing.

A month ago our college President, Dr. George Vaughan, described the process at a master planning workshop in Charlottesville sponsored jointly by the University of Virginia Center for the Study of Higher Education and the Virginia Community College System central office. Dr. Vaughan observed that in his opinion a planning process such as the one we use could work well only in a college in which there is a high level of trust. If this is true, and I suspect that it is, it is because the planning process appears to be very much a top-down oriented process. But I submit that while the plan eminates from the president's staff, the ideas in it come from the faculty members.

However, before I get ahead of myself let me put this presentation into context. The general theme of this group of presentations involves facilities planning. My presentation is not strictly on facilities planning although that will be mentioned where appropriate. My approach in general is to relate to you how our college short-range planning process developed and how it works now, then how our long-range planning process developed and finally how the mid-range linkage between the long- and short-range planning processes evolved. Facilities planning is one aspect

of each of these processes and a part of each of the plans that result from them. So maybe this is facilities planning at its very best--that is, integrated into the overall context of college master planning.

One final caveat, this is one case study, and I readily acknowledge and accept all the faults and limitations associated with that method of inquiry; moreover the reporter in this case study was not an outside observer but rather an involved participant. The biases implied by that arrangement are unavoidable and readily admitted. However, whenever I offer my opinion rather than the case study itself, I will try to always identify that divergence.

The President's Staff at Piedmont consists of the President, the three Deans: Instruction, Student Services and Administrative Services--and myself. I think planning began in a formal sense at our college during a staff meeting when I observed that I had just completed enrollment projection out ten years from the current one and the Dean of Instruction had just completed and submitted to the central offices a Six Year Curriculum Plan--that is, those academic programs the college intended to phase in and phase out over the coming six years. We had done this without talking to each other. I further observed that since the students I had projected would be attending classes in the Dean's new programs it might be a nice idea if we at least exchanged some thoughts concerning what impact academic program changes would have on future enrollments. And that we ought to devise a process for doing that regularly.

I was at that time Coordinator of Institutional Research. Shortly after that I became Coordinator of Institutional Research and Planning. The staff pursued this idea of devising a way to coordinate our various projections into a cohesive picture of where we were going. One of the

big questions then was, "Will our limited number of classrooms support the projected growth in students?" That is still a problem for us. We have avoided facing up to space limitations for several years by renting off-campus space, but now a budget tightening together with the threat of differential funding has brought us back face-to-face with that problem.

That is how long-range planning started at our college. But short-range planning which started slightly later became formalized and instituted much more rapidly than the long-range process.

The college short-range planning process also received its start in a staff meeting. The subject of discussion was the appointment of the multi-year appointment and promotions advisory committee. Constituting the committee involves carefully following both local and state policy statements. In this process the deans must make certain that all eligible faculty are notified of the process and are given an opportunity to inspect and update their professional files. The flow of recommendations for or against promotion or multi-year appointment and the rules for forwarding faculty records to the committee all represent a complex process in which the faculty members understandably take more than passing interest. The President, about half-way through the discussion realized that he and his staff had carried on an almost identical discussion one year previously. We had found ourselves "reinventing the wheel."

That was in the fall of 1979. The Dean of Instruction and I wrote out each step in the multi-year appointment and promotion committee process. Each step was tied to a date. Initially the dates were calendar dates--like January 16th. But we found through experience that many of the dates can be expressed as perpetual calendar dates, such as the end of the second week in January. By expressing dates in that way we do not need to revise

the list of activities when a date falls on a Sunday.

The multi-year appointment and promotions committee subcycle--for that is what we named that particular process--is now one of forty that are being followed every year. Subjects for other subcycles include the publication of the college catalog, the college graduation ceremony--a subcycle that actually begins in November when caps and gowns are ordered for the faculty and students and the coordination of budget preparation, with separate subcycles for the local funds budget and the annual budget. A separate subcycle was developed to coordinate the handling of year-end money in order to get the maximum potenital out of available funds.

Each of the 40 subcycles belongs to one person: the President, one of the three deans, myself or the public information officer. That person is responsible for managing the activity, reminding other participants of their responsibilities, and coordinating any changes in the subcycle itself with all parties involved.

Prior to the initiation of the short-range planning subcycles I had been publishing a College Working Calendar about July 1st of each year. It showed the dates of each academic quarter--registration, exam week--those sorts of things as well as Board meetings, Administrative Council Meetings, Holidays and so forth.

I experimented briefly with trying to insert all of the events of every subcycle into the working calendar--that was an unwieldly mess. So I selected two or three dates from each subcycle and inserted them into the working calendar. Those dates include at a minimum a starting and ending date for each subcycle. This serves as a reminder to the person who is responsible for managing that subcycle without overcrowding

the calendar, which we now call the short-range planning calendar.

At the same time I wrote a short FORTRAN computer program to set up and print out the calendar--you in put the day-of-the-week on which January the first falls- whether or not the year in question is a leap-year the dates of the Holidays and the various events--one to a data card.

The calendar is printed out by month with the format date/day of week, event subcycle name and remark, if appropriate, such as "subcycle starts". The program contains its own simple sort routine and it runs very quickly on the IBM computer we use in Richmond. The total turn-around time to our Charlottesville terminal is never over ten seconds- usually three or four. I still plan a year in advance, but I publish a major revision of the planning calendar every six months--in December and in June so for every major revision I add six months on the far end of the calendar and drop the six months just completed out of the calendar. Of course I can publish corrections in a day--all I need to do is change an event card, insert a new revision date, run the program and reduce the print-out to 8 by 10 in xerox pages. Distribution is limited to the president, the deans and their secretaries and the PIO. Each dean very often has to establish his own dates for the next echelon of management so giving the the next level of managers a copy of the planning calendar would create confusion.

We are satisfied with this short-range process. It is simple and has a high pay-off because we do not have to reinvent activities that should be essentially repetitive from year to year. The Dean of Instruction has asked me to help him build a parallel planning calendar one level lower--for his use with the four division chairmen and two directors under his supervision.

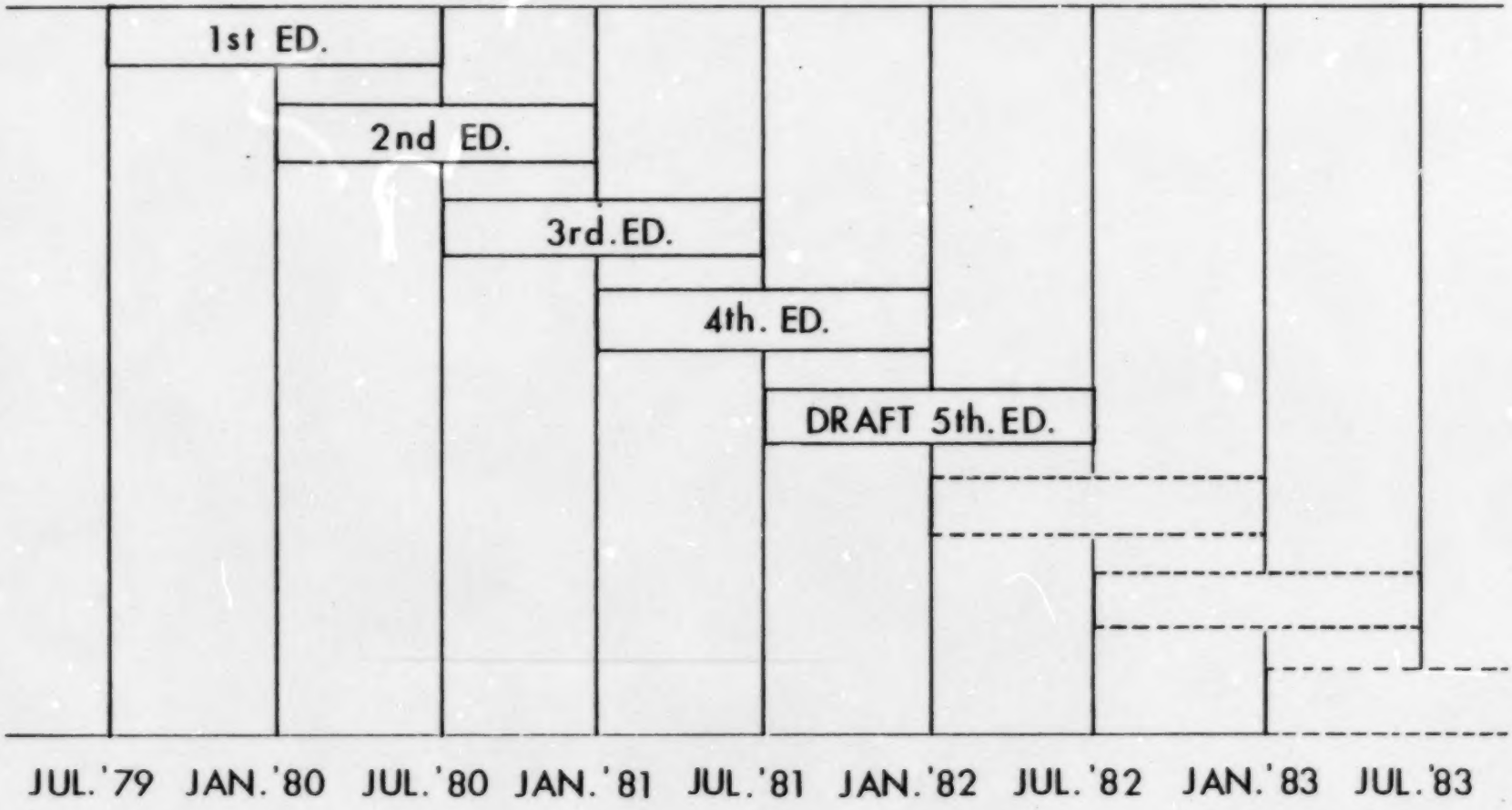
PVCC SHORT-RANGE PLANNING CALENDAR FOR FEB. 1982

Revision
Jun. 12, 1981

DATE DAY	ACTIVITY	RESP: SUBCYCLE REMARK	SUBCYCLE NO.
FEB. 18,'82 THU.	VCCS BOARD MTG		
FEB. 18,'82 THU.	TITLE III STEERING CMTE. MTG, 3:00 PM		
FEB. 26,'82 FRI.	PROPOSED SUMMER COURSE ASSIGNMENTS TO DOI	DOI,STAFF SUMMER TCHG ASSIGNMENTS (SUBCYCLE STARTS)	46

Slide 1

PVCC SHORT-RANGE PLANNING CALENDAR



Slide 2

I mentioned previously how our concern with long-range planning started. The staff discussed several approaches for about six months. We decided not to create a planning committee or task force, rather we determined that long-range planning would be accomplished within the existing governance structure of the college. For example, since the inception of the college we have had a curriculum and instruction committee with broad faculty membership to address proposed curricular and program changes and advise the Dean of Instruction. It was felt strongly that to create an ad hoc committee to accomplish long-range planning in the program and curricular areas would be at least confusing and probably insulting to the membership of the standing committee. Moreover, as I mentioned earlier, there was already a State-imposed requirement to develop a six-year curriculum plan with updates submitted every two years. There was also a facilities utilization study conducted by the State Council of Higher Education on a two-year cycle with supporting room-use documentation submitted by the colleges. Considering those planning activities, and adding to them the biennial budget cycle which includes capital outlay requests and the biennial enrollment projection cycle--and several more--there was no lack of virtually independent and disjointed long-range planning activities at the college answering various purposes and timed to several uncoordinated cycles.

We recognized the strong need to coordinate these activities and more importantly to align these plans to coincide with high priority college goals and objectives.

In building a planning methodology we recognized two basic approaches to planning. One involves looking out to the far end of your long-range

planning time horizon and asking the question "what should this college become in the next ten years?" In other words the planner determines what is required for the college to become what it ought to become based on its mission and purpose. Goals and objectives are established based on that long-range vision of what the college should become. In contrast to that requirements mode of planning, we also addressed the capabilities mode of planning in which we start with the present situation and an assumed flow of available resources and plan a year at a time into the future using the assumed resources as best we can to move toward our previously established goals and objectives.

The two approaches to planning produce different results, of course. For example when we determined the personnel requirements needed to fully implement what we felt the college should become over the next 10 years we found that we would need eight additional administrators and 28 additional classified staff members. But in the capabilities mode we figured that if we met our enrollment projections we would be authorized only one more administrator and eight more classified staff members in the same time frame. This short-fall, seven administrators and 20 classified staff members has helped clarify the extent to which we have to set priorities and identify trade-offs that can be made in pursuing various college goals and objectives. Of course new personnel short falls over the next ten years constitute only one type of potential problem area. All resources will be in short supply--people, money and facilities. But now we have a way to approach the question, "out of all the things we know we should do--what will we be able to do?"

The actual document--the PVCC Master Plan records both modes of planning. It starts with a collection of data about the various characteristics

of the college environment

demographic

geographic

economic

and of the potential sources of students and job opportunities available.

We also collected background information on the characteristics of the college

faculty

administrative faculty

classified staff

physical facilities

budgets

academic programs

students

and graduates.

SLIDE #3

For each of these areas time series data were used to identify trends, and, where possible, projections were made into the future based on planning assumptions.

Another section of the plan was devoted to identifying relationships between these characteristics and trends--trying to get at the questions, "what does it all mean?" "When one aspect changes what impact does it have on other aspects of the college?"

The college goals and objectives were developed by the deans based on their discussions with their middle managers and they, in turn, with faculty and staff members. The directions for where the college should go, therefore, were initially articulated by the faculty and staff in meetings with their immediate supervisors as well as in the regularly established

PVCC MASTER PLAN CONTENTS:

.Environment

DEMOGRAPHIC
GEOGRAPHIC
ECONOMIC
STUDENT SOURCES
JOBS AVAILABLE

- CHARACTERISTICS
- TRENDS
- PROJECTIONS
- ASSUMPTIONS
- RELATIONSHIPS

.College

FACULTY
ADMINISTRATIVE FACULTY
STAFF
PHYSICAL PLANT
BUDGETS
ACADEMIC PROGRAMS
STUDENTS
GRADUATES

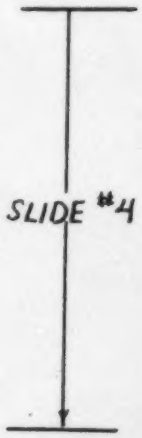
- MISSION
- GOALS
- OBJECTIVES

Slide 3

committees in which much of the administrative work of the college is carried out.

When the goals and objectives were in place, and we did not wait for them, we started data collection and interpretation while goals and objectives were being formulated, the staff was able to complete the plan and present it in draft to the College Board, the administrative staff and faculty members for review and comment.

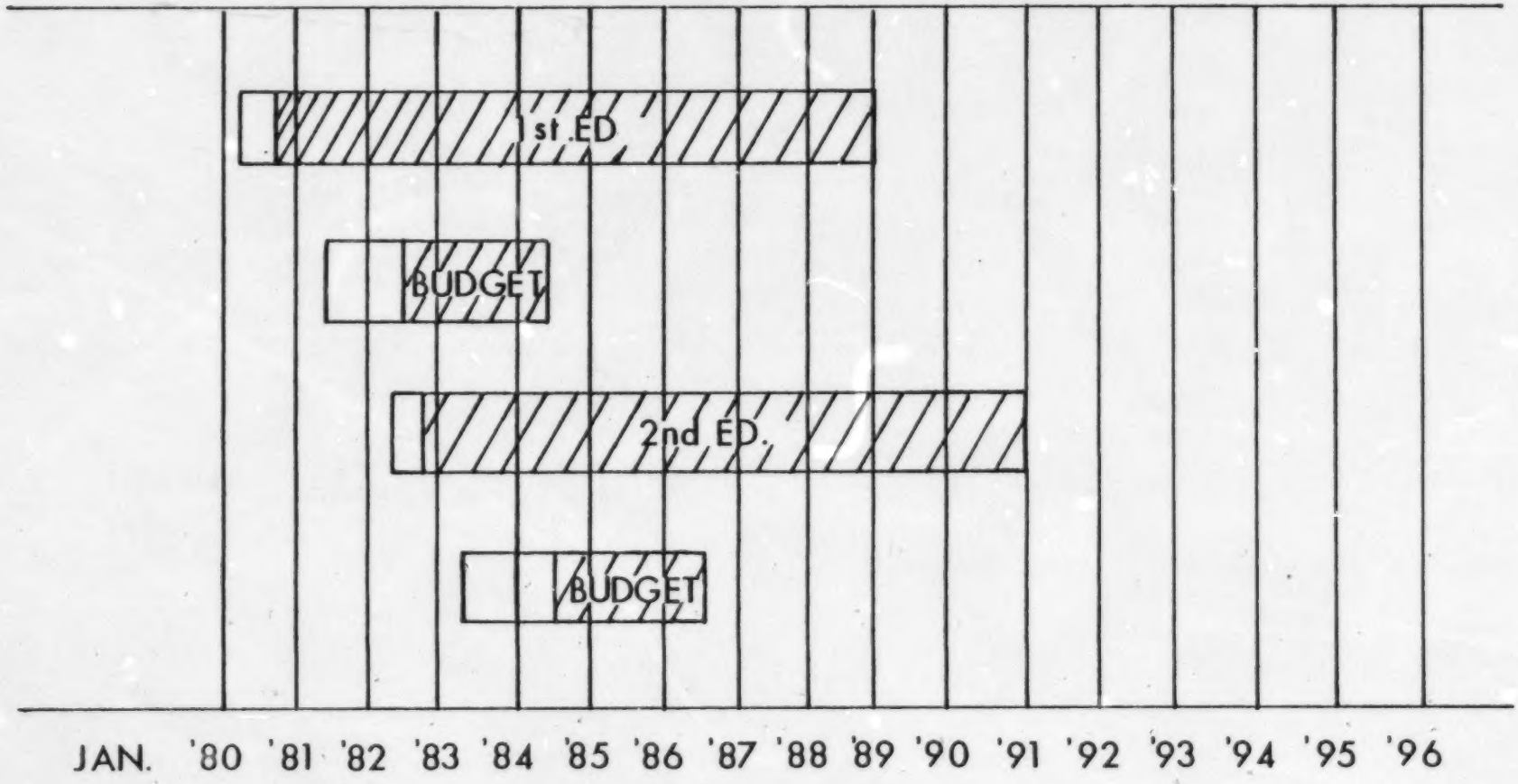
The timing of the master plan was critical. One of the major purposes of this plan is to input into the biennial budget by providing the set of goals and objectives upon which the budget submission is based. The plan is prepared in the spring and summer of even-numbered years to be ready for review and comment by the Board and faculty in the fall and final approval at the State Board level in early winter of the following odd-numbered year. At that point the biennial budget preparation including capital outlay requests begins.



One final topic is mid-range planning. We started out trying to tie innovation to a mid-range planning cycle. Our idea was that the college administrators would identify and suggest one- or two-year projects that we were not doing, but that we felt were worth trying out. After the trial run the project might be incorporated into the on-going routine activities of the college--or it might be abandoned. This approach did not produce results.

We have since changed our outlook on mid-range planning, retaining some of the idea of encouraging innovation, but concentrating on using it as a link to connect long- and short-range planning activities. This is now being tried by means of the deans reviewing the College goals and objectives with the staff and faculty in an attempt to clarify priorities

PVCC LONG-RANGE MASTER PLANNING CYCLE



Slide 4

so that the objectives toward which we work in the short run really reflect what the consensus of the college considers most important.

In summary, let me remind you that this planning system I have described is essentially top-down with a provision for ideas and feedback from faculty. It is based on the use of the existing governance structure of the college rather than an ad hoc arrangement, it operates on prescribed cycles rather than on a one-time basis and it makes clear distinction between short- mid- and long-range planning activities.

It has been my pleasure to relate the Piedmont Virginia Community College Case study on Master Planning to you this morning, I again thank you for the invitation.

OCT 9 1981

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